Introduction to Citation Management

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OHSU Library
Housekeeping!

Questions welcome anytime - type them in the chat

Get ready to answer poll questions - pollev.com/mwhite387
By the end of this session, you will be able to...

**Benefit**
- Summarize the basic features and usefulness of reference managers

**Record**
- Use a reference manager to collect article citations and full text

**Organize**
- Implement an organization strategy

**Cite**
- Use a reference manager to insert citations and create a bibliography

**Support**
- Identify where to go for help and technical support

**Register**
- Sign up for hands-on workshops
Why use a reference manager?

- Collect, organize, and share bibliographic references
- Collect, organize and share web bookmarks
- Collect, organize, and share project files
- Automatically retrieve full-text PDFs
- Automate insertion and formatting of citations
- Build a personal database of research interests
The references for my paper for which I am providing so much evidence no one will be able to deny the results! Too bad the journal publishing my awesome paper wants me to change the citation style...


Selecting a Reference Manager
Which of these are effective reference managers?

A box of index cards
EndNote
Google Docs
Mendeley
Microsoft Word
Zotero
The bookmarks in your web browser
## The Big Three
### Endnote, Mendeley and Zotero

<table>
<thead>
<tr>
<th>Software</th>
<th>Cost to Access</th>
<th>Online PDF Storage</th>
<th>Open Source</th>
<th>Browser Integration</th>
<th>Word Processors</th>
<th>Mobile Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>EN</td>
<td>Provided by OHSU Library</td>
<td>Unlimited</td>
<td>No</td>
<td>Web bookmarklet EndNote Click</td>
<td>MS Word Pages Google Docs (new!)</td>
<td>iOS only</td>
</tr>
<tr>
<td>Mendeley</td>
<td>Free</td>
<td>2GB Free</td>
<td>No</td>
<td>Web importer</td>
<td>MS Word Word Online Libre Office</td>
<td>iOS Android</td>
</tr>
<tr>
<td>Zotero</td>
<td>Free</td>
<td>200MB Free</td>
<td>Yes</td>
<td>Browser extension</td>
<td>MS Word Open Office Libre Office Google Docs</td>
<td>iOS Third-party</td>
</tr>
</tbody>
</table>
Which reference manager should you choose?

- Free or paid?
- Open source or proprietary?
- Operating system support?
- Integration with word processors and web browsers?
- What are your friends, collaborators, and PI using?
Comparison of reference management software

From Wikipedia, the free encyclopedia

The following tables compare reference management software. Readers using the table to choose reference management software should note the product's "latest stable release date". An older release date suggests that the product is not currently supported and users may encounter technical issues and receive little to no technical support.

Contents

1 General
2 Operating system support
3 Export file formats
4 Import file formats
5 Citation styles
6 Reference list file formats
7 Word processor integration
8 Database connectivity
9 Password "protection" and network versions
10 References
11 Bibliography
Getting a Reference Manager & Getting Stuff Into It

Live Demo!
Which reference manager would you like to see a demo of?

- EndNote
- Zotero
Getting a reference manager

**EndNote**
- https://libguides.ohsu.edu/endnote

**Zotero**
- https://www.zotero.org/download
Getting stuff into a reference manager

- Database Exports: Importing citations from database exports
- Manual Entry: Entering references by hand
- Web Browser Bookmarklets or Extensions: Capture online references
- Finding Full Text: Locate full text from the Library and the Web
Finding Full Text
When Your Reference Manager Can’t
Get it For Me and Open Access
Off-Campus Access

Start at the Library’s website

https://libguides.ohsu.edu/remoteaccess has lots of helpful info and a browser bookmarklet you can use when you forget to start at the Library’s website
Getting Full Text from the Library

OHSU Library Get It For Me

- Look for this button in your database results:
  - Find @ OHSU

- What does this button do?
  1. Searches the Library catalog
  2. If we have access, it sends you to the item
  3. If we don’t have access….
The digital doctor: hope, hype, and harm at the dawn of medicine's computer age
Wachter, Robert M., author.
Publication date: 2015
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Email
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Chapter Title

Chapter Author

Chapter Number Volume

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Note

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Managing and Using References
Organizing Stuff

Organization Features

Searching and Sorting

Finding Duplicates
Bibliographies and Citations

ADDING CITATIONS

CHANGING STYLES
Getting Help

Official support channels are your best option for technical help

- EndNote Support
  https://support.clarivate.com/Endnote
- Zotero Documentation and Forums
  https://www.zotero.org/support/
  https://forums.zotero.org/discussions

OHSU Librarians can help you plan and strategize:

- Guidance on using your reference manager effectively for learning and research
Workshops!

EndNote Basics

• In person at RLSB: Thursday, October 26, 2023, 3:00pm
• Online: Wednesday, November 29, 2023, 12:00pm

Zotero Basics

• In-person at RLSB: Thursday, October 12, 2022 3:00pm
• Online: Wednesday, November 8, 2022 12:00pm

Register!

• https://librarycalendar.ohsu.edu/calendar/workshops
OHSU Library is your learning, care and discovery partner
Anytime. Anywhere.